

WELCOME TO THE IOWA DEPARTMENT OF TRANSPORTATION!

As with any new job, you need to complete several “new hire” forms. Instead of having you complete these forms on paper, the Iowa Department of Transportation (IDOT) uses an **Onboarding** process in **Workday**. Getting set up in **Workday** and then completing the tasks in the **onboarding** process prior to your first day of employment with the IDOT is vital for you to get paid, set up your direct deposit information, and view your payslips. A checklist of the tasks that need to be completed (items in **blue** are direct links to existing job aids to help you) and detailed steps to completing those steps are below.

WORKDAY CHECKLIST



1. Complete Initial Sign-In to the Iowa DOT Workday Site
 - a. Use the **Username** and **Password** found in the emails sent to your home email address
 - b. Change password
2. Watch Welcome Video (found in the Workday Home Page Welcome Announcement)
3. Complete Onboarding Inbox items
 - a. Enter Contact Information
 - b. [Enter Personal Information](#)
 - c. Change Emergency Contacts
 - d. [Manage Payment Elections](#)
 - e. [Complete Federal Withholding Elections](#)
 - f. [Complete State and Local Withholding Elections](#)

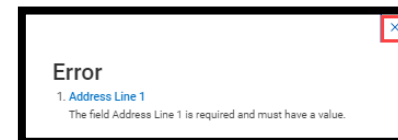
g. Change Veterans Status Identification

4. Review documents



- a. State of Iowa Handbook - eSign
- b. Work Rules - eSign
- c. Medical Emergency Fillable Form
- d. Drug and Alcohol Policy (if applicable)



HELPFUL HINTS FOR COMPLETING YOUR ONBOARDING

-  If you receive an error message  while completing these forms, click on the **red** error box and read the description. After reading, click the **X** in the upper right corner of the box to close it. Make the necessary changes in the fields. If you need help, contact your manager.



 Edit Icon 

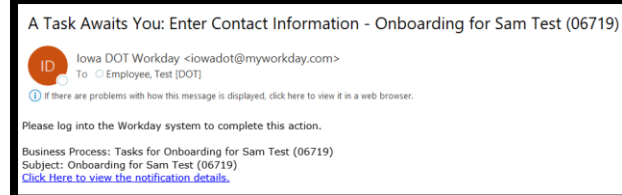
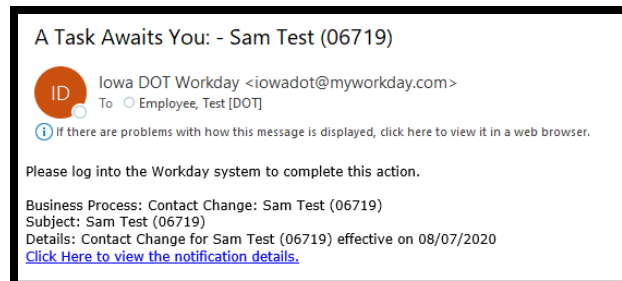
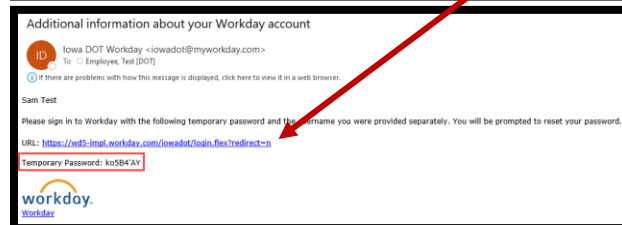
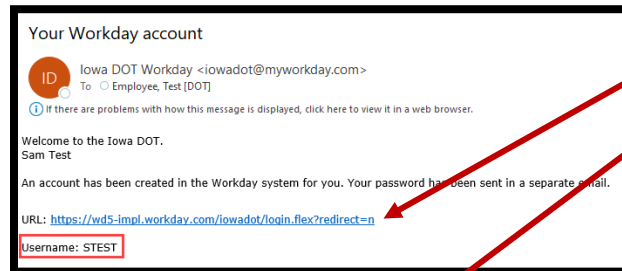
 Save Icon 

-  Should you ever get confused and not sure where you are in completing tasks, just click on the **Inbox** icon  to find the list of tasks still needing your attention.

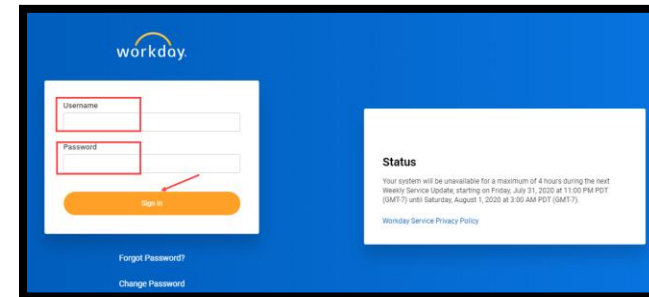
Let's get started!

INITIAL SIGN IN TO THE IDOT WORKDAY SITE

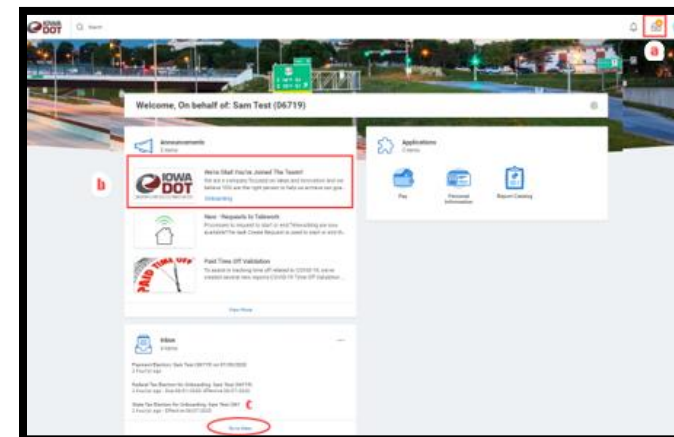
1. Four initial emails will be sent to your home email address with your Workday Username, Password and a Task to complete






2. To log into the Workday system, click on the **blue** URL in the body of your email message (either for **Username** or **Temporary Password**)
3. Enter the **Username** and **Temporary Password** from the emails sent to you

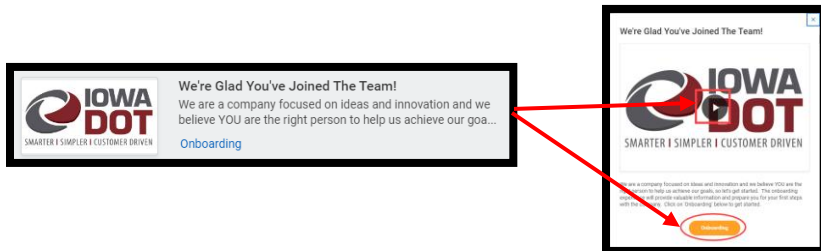


4. Click the orange **Sign in** button
5. Follow instructions to change your password

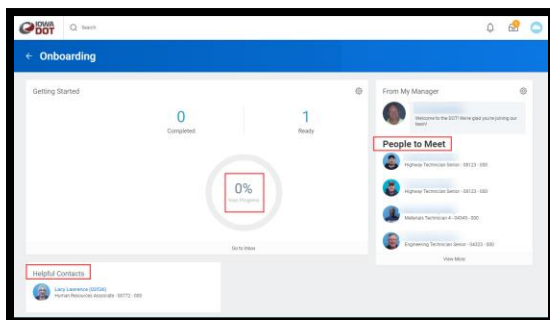


6. Workday allows you to access your tasks in multiple ways
 - a. An inbox icon  in the upper right-hand side of the Workday Home Page indicates that you have a task to complete

- b. An **Announcement** welcoming you to the IDOT will take you to a Welcome video (click on the **Announcement** and then on ) and directly to your **Onboarding Dashboard** (click )

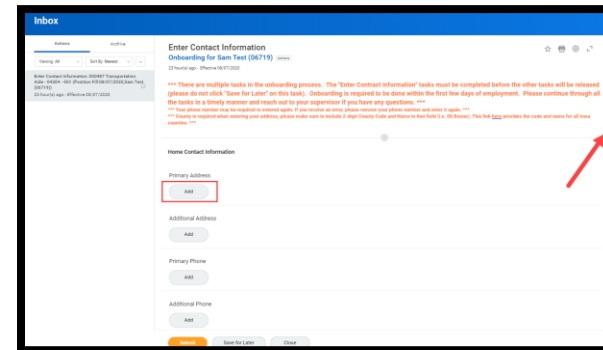


Your **Onboarding Dashboard** shows **Your Progress** in completing tasks as well as **Helpful Contacts** and **People to Meet**

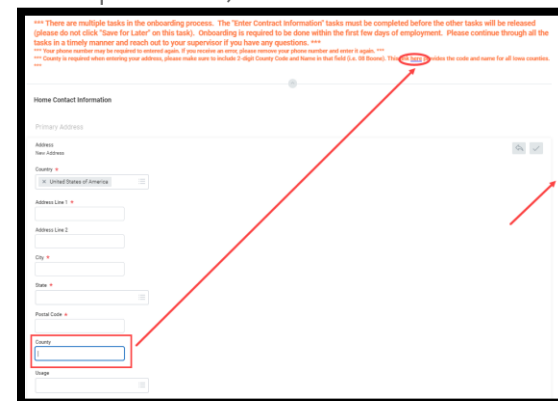


- c. A **Go to Inbox** notice in the lower part of the Home Page also indicates that you have an item in your Inbox that needs your attention

7. Read the information in **ORANGE** at the top of the page for assistance in completing the fields and use the **scroll bar** to move down the page




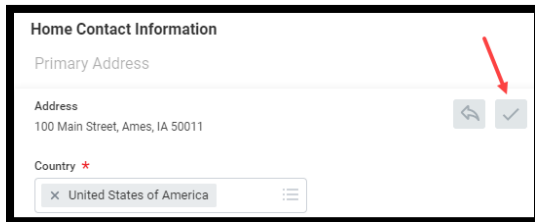
8. Complete the **Enter Contact Information** sections by clicking on the **Add** button on each section and filling out the information (* = required field)



Notes:

- **County** is a required field (even though it isn't marked *).
- As mentioned in the **ORANGE** comments at the top of the page, type in the 2-digit **County code** and the **County name**. For assistance in finding the County code number, click the [link here](#) - found in the **ORANGE** comments.
- If your address is outside of Iowa, enter **00** for the **County code** and **No County** as the **County name**.

9. Once the **Primary Address** fields are complete, click the  button to **Save Primary Address**




Home Contact Information

Primary Address

Address
100 Main Street, Ames, IA 50011

Country *
x United States of America

10. Scroll down the page and complete remaining sections using the **Add** button or the **Edit** icon  to expand the section to allow you to enter the information



Important: If you get an error when entering your phone number, change the phone number type (i.e., landline to mobile or vice versa). Click outside the Phone section and then click back into the Phone section and switch the phone number type back to the correct one. You will be able to continue with your Onboarding. (Workday glitch we are trying to fix.)

11. After completing all necessary fields, click 

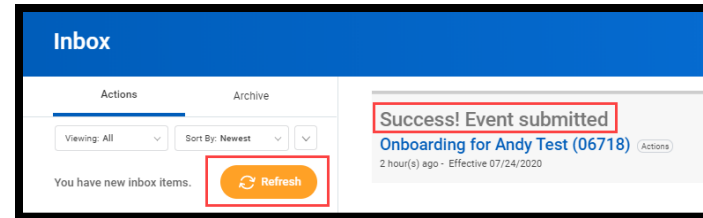


Note: Do **NOT** click the **Save for Later** button as that will cause errors in your Onboarding process.



Submit **Save for Later** **Close**

12. Click  in your inbox




Inbox

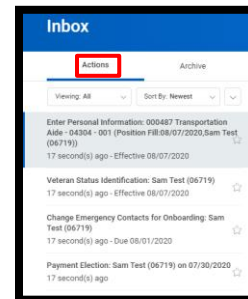
Actions Archive

Viewing: All Sort By: Newest

Success! Event submitted
Onboarding for Andy Test (06718) (Actions)
2 hour(s) ago - Effective 07/24/2020

You have new inbox items. 

13. Additional onboarding tasks are now waiting for your action



Inbox

Actions Archive

Viewing: All Sort By: Newest

Enter Personal Information: 000487 Transportation Aide - 04304 - 001 (Position Filled 08/07/2020 Sam Test (06719))
17 second(s) ago - Effective 06/07/2020

Veteran Status Identification: Sam Test (06719)
17 second(s) ago - Effective 06/07/2020

Change Emergency Contacts for Onboarding: Sam Test (06719)
17 second(s) ago - Due 06/01/2020

Payment Election: Sam Test (06719) on 07/30/2020
17 second(s) ago





Note: If you click the **Inbox** icon at the top of the page, the completed task is removed from the **Inbox Actions** column.



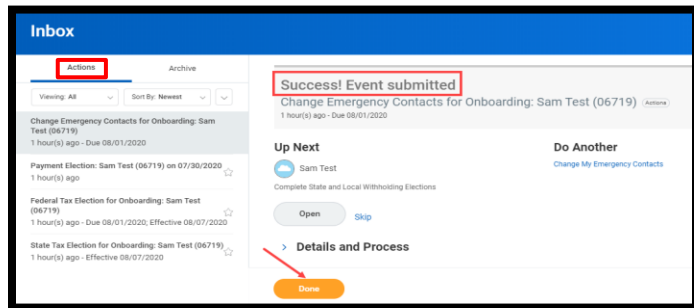
IOWA DOT Search 

14. Click on the next task and complete the information

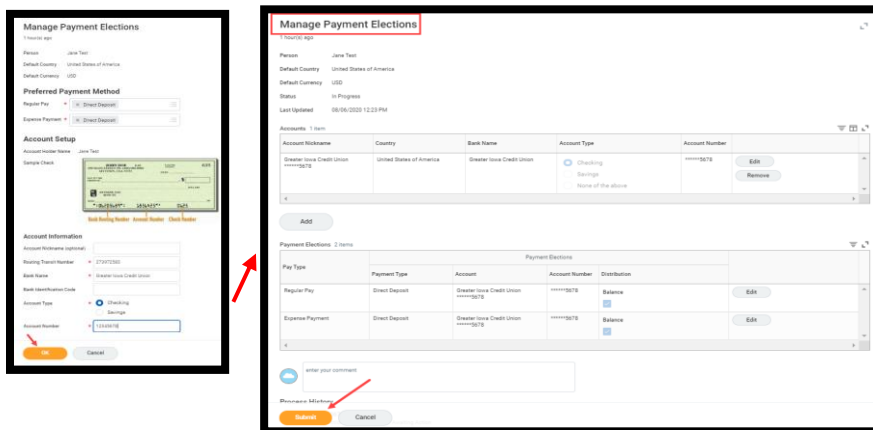
- Click the  button in each section to enter information or edit fields (some fields are autofilled)
- * = Required field
- Click the  button to **Save** the information

15. Click  each time you complete all information in a task

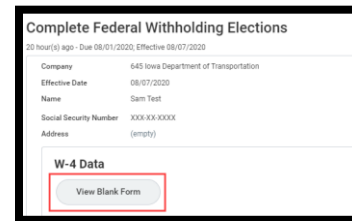
16. When you successfully complete a task, click **Done**



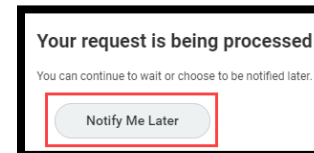
17. When you complete the **Payment Election** task and click **Submit** a **Manage Payment Elections** screen will appear. This allows you to add bank accounts and indicate how you would like your paycheck divided. Please see the job aid, [Update your payment elections \(direct deposit, etc\)](#) if you need specific instructions on how to complete this section. Once you have entered all bank information, click **Submit**



18. Federal Tax Election for Onboarding gives you the option to view a blank W-4 form. Click **View Blank Form** to download the W-4



Note: The w-4 will not appear immediately. The screen will display:

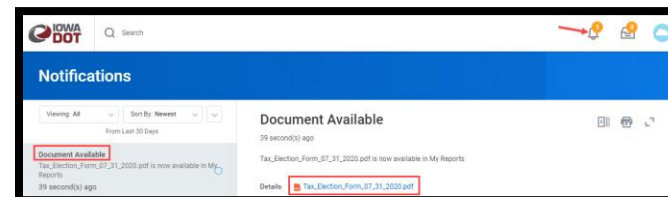


19. Click **Notify Me Later**

20. Click on the **Notification** bell at the top of your screen



21. When ready, you will see **Document Available**



22. Click on the **blue Tax_Election_Form**

23. After reviewing the form, click anywhere outside the document to close the form

24. Click the **Inbox** icon  to return to the **Complete Federal Withholding Elections** screen



Note: After entering your information, scroll down to the bottom of the screen and click the **I Agree** box as it is a **required** field

I Agree ☒

- 25.** The **Complete State and Local Withholding Elections** is autofilled. You will not need to fill in any fields. Just click the **OK** button

Complete State and Local Withholding Elections
20 hour(s) ago - Effective 08/07/2020

If you do not select an option for Marital Status, it will default to Single.

Worker: Sam Test (06792)
Company: 645 Iowa Department of Transportation
Effective Date: 08/07/2020
State: ☒ Iowa
Withholding Form Type: ☒ IA-W-4 - Withholding

OK **Cancel**

- 26.** Another screen, **Complete State and Local Withholding Elections**, will automatically display. You can **View Blank Form** (same process as outlined in the **Complete Federal Withholding Elections**) or just complete the form. Remember to scroll to the bottom and click the **I Agree** box

I Agree ☒

Complete State and Local Withholding Elections
20 hour(s) ago - Effective 08/07/2020

If you do not select an option for Marital Status, it will default to Single.

Company: 645 Iowa Department of Transportation
Effective Date: 08/07/2020
Name: Sam Test
State: Iowa
Social Security Number: 000-00-0000
Address: 100 East Street, Ames, IA 50011, United States of America

Iowa IA-W-4 Data
View Blank Form

By filling out the information below, you are completing the appropriate state Employee Withholding Allowance Declaration Certificate which affects how much income tax is withheld from your pay. You should review the state return form and accompanying instructions before filling out the information below.

Marital Status: ☐ Single ☐ Married ☐ Separated ☐ Divorced

State of Domicile: ☐ Iowa ☐ Other

Legal Name:

I Agree ☒

Submit **Save for Later** **Cancel**

- 27.** After you click **Submit** and **Done**, if not automatically displayed on your screen, find the remaining Inbox items for reviewing documents on the left side of your screen under **Actions**. Follow the steps below to **Review** and **eSign State of Employee Handbook**

- 28.** Click on the **State of Iowa Handbook** option under **Actions**

Inbox

Actions **Archive**

Viewing: All Sort By: Newest

Complete Federal Withholding Elections
5 minute(s) ago - Due 10/18/2020; Effective 10/16/2020

Review and eSign State of Iowa Employee Handbook: 013083 Transportation Aide - 04304 - 000 - Fred Test (06792)
5 minute(s) ago - Due 10/17/2020; Effective 10/16/2020

Review Documents for Onboarding for Fred Test (06792)
5 minute(s) ago - Due 10/17/2020; Effective 10/16/2020

Documents

Instructions
As Employee
Please open the attached document and review the *State of Iowa Employee Handbook*. When you have completed the review, click on the **eSign by DocuSign** button at the bottom of this page.

You may see a pop-up box with the message demo.docusign.net wants to track your physical location. This is Not Always deny and don't tell me.

- a.** Click on the **blue** link to open the **State of Iowa Employee Handbook** and read the document



Note: The document will download. Depending upon your web browser, you may need to look at the bottom of your screen and then click the document to open

Actions **Archive**

Viewing: All Sort By: Newest

Complete Federal Withholding Elections
5 minute(s) ago - Due 10/18/2020; Effective 10/16/2020

Review and eSign State of Iowa Employee Handbook: 013083 Transportation Aide - 04304 - 000 - Fred Test (06792)
5 minute(s) ago - Due 10/17/2020; Effective 10/16/2020

Review Documents for Onboarding for Fred Test (06792)
5 minute(s) ago - Due 10/17/2020; Effective 10/16/2020

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Click, star, or scroll to the last page to the document and sign electronically. Once you have electronically signed the document, click the **FINISH** button in the red banner at the top of the Click Submit on the Review and eSign page in Workday.

State of Iowa Employee Handbook with eSignature.pdf

Click the button below to sign. Please note that when signing documents you will be leaving Workday Service. You may need to wait a few seconds to Workday before you close your browser.

eSign by DocuSign

- b. After you have read the document, click **eSign by DocuSign**
- c. The **FIRST** time only, you need click the box – I agree to use electronic records and signatures

- d. Click **CONTINUE**

- e. Click Start to open the **State of Iowa Handbook**

- f. Click **Sign**

Note: Next will appear the **First** time you eSign

Note: After the first time you eSign, **Sign** will appear

- g. The **FIRST** time only, you need to **Adopt Your Signature**
- i. **Select Style** – can click on **Change Style** to find other style formats

- ii. **Draw** – use your mouse to sign your name

- iii. **Upload** – upload your signature from a file

- iv. Once you have your signature entered, click

h. Click **FINISH**

i. Click **Submit**

j. Click **Done**

29. Follow Steps 27 a – k to review and eSign the **Work Rules** document

Note: Since you have already created your signature, you will not need to complete Step d or Step h (i – iv)

30. Finally, you need to **Review Additional Onboarding Documents** (Medical Emergency Fillable Form, Drug and Alcohol Policy – if applicable to your position). Each of these documents will have a link (in **blue**) for you to click and review. After reviewing the document, click the **I Agree** box. When all required documents have been read and the **I Agree** boxes checked, click **Submit**

31. **Congratulations! You have just finished your Onboarding form completion process!!**

32.